

France

France key data 2021

Population (m)	65.4	Consumer spending on digital video and TV VoD (€m) - Total Europe	19,298.5
TV households (m)	28.6	Comparison with 2020	22.9%
Consumer spending on physical video software (€m)	290.2	Consumer spending on total video (€m)	2,827.3
Comparison with 2020	-11.5%	Comparison with 2020	17.4%
Consumer spending on physical video software (€m) - Total Europe	1,434.0	Consumer spending on total video (€m) - Total Europe	20,732.5
Comparison with 2020	-21.8%	Comparison with 2020	18.2%
Consumer spending on digital video and TV VoD (€m)	2,537.1		
Comparison with 2020	21.9%		

France key commentary

Market developments

The French video market experienced a 17.49% growth in consumer spending on video software (physical carriers and online) in 2021 compared to 2020. The total French video market now represents a value of around EUR 2,8 billion.

In 2021, the French DVD/Blu-Ray market contracted by 11.5% in value compared to 2020, closing at EUR 290 million. The decrease of the physical market is due to several factors: the high level of internet piracy in the French market, the broad offer of free TV services and catch-up TV offer available to French audiences as well as the shift in consumer preferences towards online services, including subscription-based models.

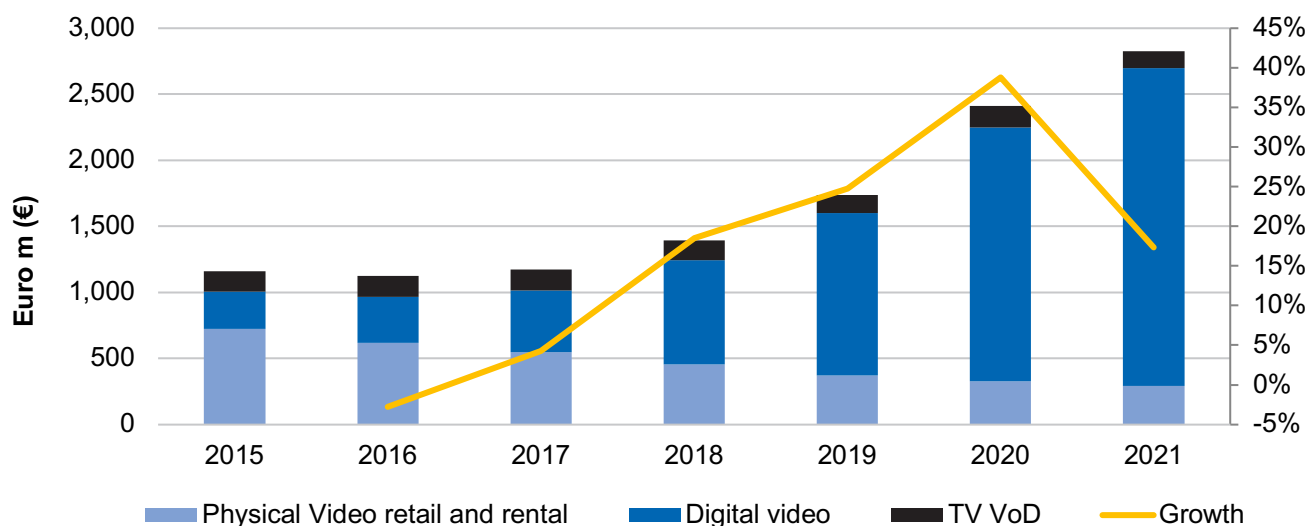
The online market experienced healthy performance in 2021, in particular as regards SVOD services, contributing to offsetting the market performance of the physical formats.

Other relevant developments

In France, DEGI and SEVN launched the “VODays” consumer campaign in January 2022. This initiative brought to the market a week-long digital campaign across nine of the top digital retailer platforms in France offering audiences a selection of new and popular films at promotional prices across both sell-through and rental options.

This commentary was provided by SEVN, the French Digital Video Association.

Consumer spending by segment



Video market: France

	2015	2016	2017	2018	2019	2020	2021	20/21
GENERAL								
Population (m)	64.5	64.7	64.8	65.0	65.1	65.3	65.4	0.2%
TV households (m)	27.5	27.7	27.9	28.0	28.2	28.4	28.6	0.6%
Population Total Europe (m)	629.4	631.1	632.8	634.4	635.7	636.7	637.3	0.1%
TV households Total Europe (m)	258.6	260.2	262.1	263.8	265.7	267.6	269.2	0.6%
Broadband households (m)	19.9	25.0	25.6	26.2	27.2	27.9	28.4	1.8%
Nominal GDP (EUR m)	2,198.3	2,232.4	2,298.6	2,362.4	2,426.9	2,255.6	2,396.6	6.3%
Consumer price index (100 in 2010)	100.0	100.0	103.1	110.3	105.9	107.9	110.6	2.6%
DVD Video player/recorder penetration (%)	72.2	71.0	70.0	69.2	68.5	67.8	66.8	-1.5%
Blu-ray Disc player/recorders penetration (%)	21.8	22.6	23.0	22.7	22.0	21.1	20.0	-5.4%
DVD Video player/recorder Total Europe (%)	69.4	67.0	64.4	61.7	59.2	56.9	54.7	-3.8%
Blu-ray Disc player/recorders penetration Total Europe (%)	20.7	21.8	22.3	22.3	21.7	21.0	20.2	-3.8%
OTT Subscriptions (m)	1.9	2.5	4.8	8.3	12.1	20.9	23.9	14.4%

Total video software market

	2015	2016	2017	2018	2019	2020	2021	20/21
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (EUR m)	1,157.9	1,125.8	1,174.2	1,391.3	1,735.7	2,408.9	2,827.3	17.4%
Growth (%)		-2.8%	4.3%	18.5%	24.8%	38.8%	17.4%	
Total spending on video Total Europe (EUR m)	9,122.1	9,206.7	9,929.1	11,464.3	13,421.5	17,538.9	20,732.5	18.2%

CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING

Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.

Physical video rental (EUR m)	13.5	11.4	8.3	5.6	4.1	3.3	2.6	-19.4%
Physical video rental Total Europe (EUR m)	431.3	295.4	214.6	150.2	115.8	77.0	53.0	-31.2%
Physical video retail (EUR m)	707.6	604.8	536.6	448.6	364.6	324.5	287.6	-11.4%
Physical video retail Total Europe (EUR m)	4,736.9	3,892.9	3,295.0	2,681.6	2,199.6	1,757.5	1,381.0	-21.4%
Physical video software (EUR m)	721.1	616.1	544.9	454.3	368.7	327.7	290.2	-11.5%
Physical video software Total Europe (EUR m)	5,168.2	4,188.3	3,509.7	2,831.7	2,315.4	1,834.5	1,434.0	-21.8%

CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING

The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.

Retail digital video (EUR m)	67.9	75.4	87.3	108.2	128.7	160.2	157.0	-2.0%
Rental digital video (EUR m)	62.2	61.6	68.6	59.1	53.3	57.6	46.2	-19.9%
Subscription digital video (EUR m)	156.2	211.1	313.0	622.3	1,050.8	1,703.6	2,204.0	29.4%
Total digital video (EUR m)	286.3	348.1	468.9	789.6	1,232.8	1,921.5	2,407.2	25.3%
Total digital video Total Europe (EUR m)	3,046.1	4,076.2	5,394.8	7,557.9	9,980.3	14,491.3	18,137.9	25.2%

CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING

The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.

Pay TV TVOD (EUR m)	150.5	161.6	160.4	147.5	134.2	159.7	129.9	-18.7%
Pay TV TVOD Total Europe (EUR m)	907.7	942.2	1,024.7	1,074.6	1,125.7	1,213.1	1,160.7	-4.3%

Notes: 1) Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. 2) Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology. 3) The current online figures are a snapshot of the market in March 2022. Figures are updated regularly and so it may not be possible to compare directly to figures published after this date. 4) Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. 5) OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.

Key players in the market (in alphabetical order)

Physical	Digital
Auchan	Canal VOD
Carrefour	Google
Cultura	iTunes
DS	Orange
Fnac	SFR
Leclerc	

Share of European market 2021



Physical retail
20.8%



Physical rental
4.9%



Digital video (OTT)
13.3%



Pay TV TVOD
11.2%

Average home entertainment spending



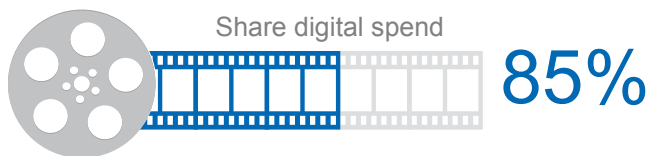
Spending per TV household (EURO)
€99.0



Spending per broadband household (EURO)
€99.6



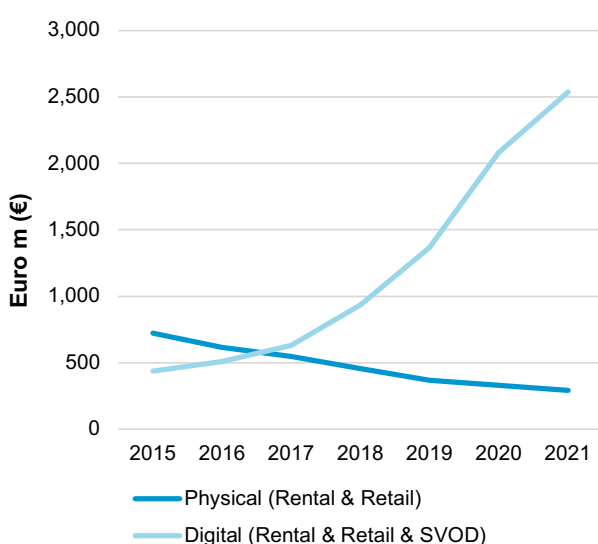
Digital share of spend vs. broadband speed



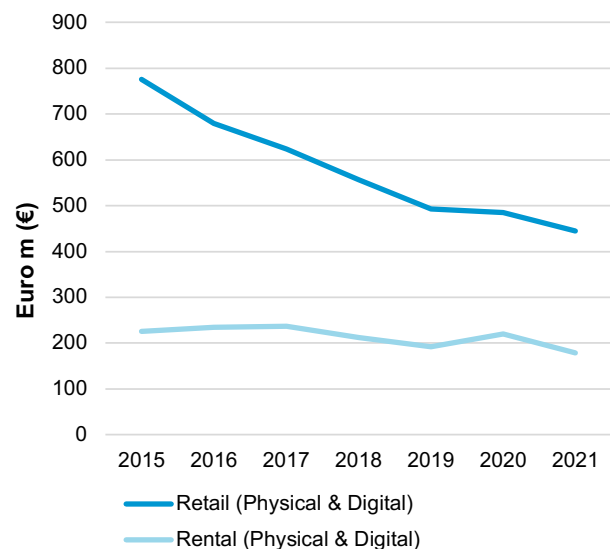
Broadband connections speed rank
(ranked across the 9 IVF countries)

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Comparison Physical vs Digital



Comparison Retail vs Rental



Note: Digital (Rental & Retail) includes SVOD data; Rental (Physical & Digital) excludes SVOD data